

ROADMAP



**Where
Innovation
Meets
Opportunity.**

Sr Advisor Welcome Guide

WELCOME

Welcome,

We would like to take this opportunity to welcome you as our latest Sr. Advisor!

Technology Source is the **Sourcing as a Service** company with over 500 best-in-class business solution providers, serving 60+ countries around the world. For more than two decades, Technology Source has been earning trust with partners throughout the United States.

Technology Source's Advisor program is unique to the industry. We have paired a global product set, including IT Services, Telecom Services and Mobility services with highly skilled Senior Advisors. We provide our Advisors access to a successful Senior Advisor, like yourself, to help Advisors on their roadmap to success. In addition, our Advisors are provided access to critical tools. These tools include; marketing resources, software, support resources, product training, use of our brand, use of our website, a Technology Source email address and business cards—all at no additional cost.

As a Sr. Advisor for Technology Source, you will play a key role in our success. Your unique background, and skill set, will be used to provide critical leadership for an Advisor team. Our Advisor teams assist our clients with a critical resource, where there is never enough budget or headcount available.

With our unique approach, your clients will have an unparalleled experience. With your help, Technology Source will guide your clients through the process of identifying project requirements, designing a custom-tailored solution, assisting with vendor selection, price negotiation and implementation support. Our service doesn't stop at the sale. Technology Source also provides implementation escalation assistance and post sale support.

Building your team will not be easy, it will take dedication, discipline and hard work. We're confident, that together, we will be successful.

Sincerely,

Dominic Antonini
President

Robert Olson
Executive Vice President

Sonya Meline
Vice President

87 Products

532 Service Providers

60+ Countries

TABLE of contents

1. Your agreement with Technology Source
2. Email. Cards. Social media.
3. Orientation
4. Senior Advisor Teaming
5. Role Review
6. Roadmap calls
7. Website
8. Client Prospecting
9. Team contacts

ELEMENTS OF SUCCESS | Agreement

Agreement

Technology Source believes a successful relationship starts with a written commitment.

Having an agreement in writing, protects all parties from misunderstandings.

Execute your agreement via the DocuSign document sent to your email address. If you did not receive a DocuSign agreement, check your junk folder within your email account.

An executed copy of the agreement will be provided, or you can contact Rob Olson at rob.o@technologysource.com for a copy.



Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

ELEMENTS OF SUCCESS | E-mail. Cards. Social Media

E-mail

Our email is on a cloud-based server hosted by Rapscale.

Look for, and be expecting an email, from Rapscale with set up information and credentials.

A company-paid email account will be available for the first 90 days. Advisors may maintain a free account if they set a minimum of three new appointments each quarter.

Set up information:

- Outlook 365
- Server information should populate automatically
- Typically, the default password is: abC1234!
- You can also access email remotely and reset your password at:
<https://webmail.rsapps.com/owa>.

If you need help setting up your email on your phone or laptop, please contact Rapscale:

- Support@rapidscale.net
- 866.686.0328



Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

ELEMENTS OF SUCCESS | E-mail. Cards. Social Media

Business Cards

You will be issued Technology Source business cards following your first client acquisition.

LinkedIn

Technology Source provides two header options, one in black and one in gray.

Please be sure to update your LinkedIn page with our company name and logo.

Social Media Posts

Please help us ensure that any social media posts or paid / unpaid advertising that utilizes our name or logo, requires approval in advance of the posting / placement. Please direct those requests to Sonya Meline, our Vice President, for approval. Sonya's contact information can be found in the last section of this on-boarding guide.



Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

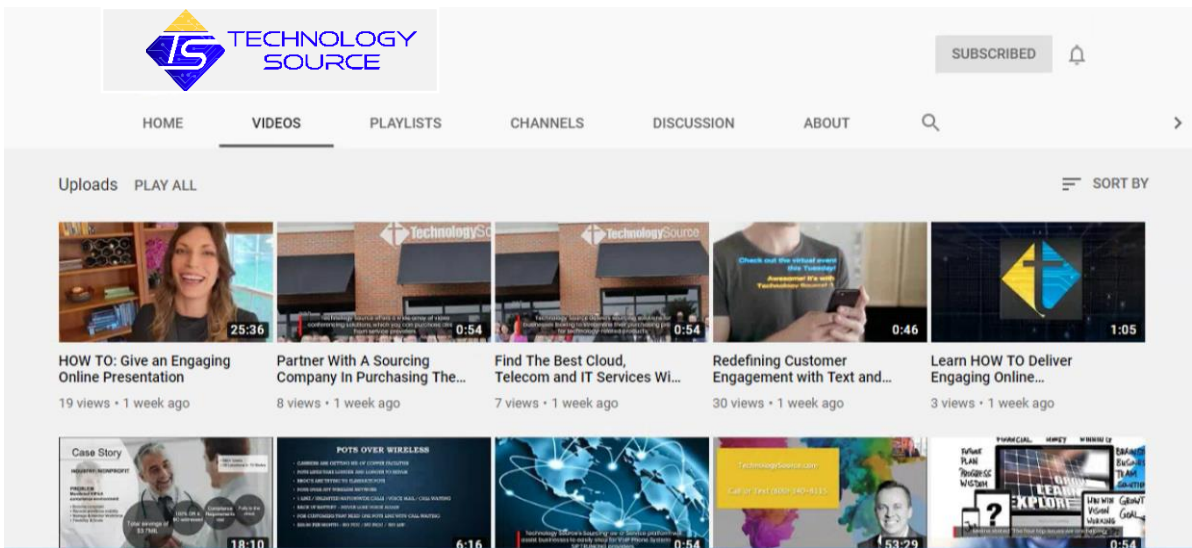
ELEMENTS OF SUCCESS | E-mail. Cards. Social Media

YouTube

Please take a moment to subscribe to the Technology Source YouTube channel.

Once subscribed, you'll enjoy viewing webinars, events and other informative videos we've posted for your convenience.

Please invite your friends and business contacts to subscribe to the Technology Source YouTube channel!



Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

ELEMENTS OF SUCCESS | Orientation

Business Operations Manager

Orientation

Our Business Operations Manager will schedule time with new Sr. Advisors during the first week, following receipt of an executed agreement, for orientation.

Items Reviewed Include

- eMail set-up
- eMail signature set-up
- LinkedIn Set Up
- Social Media Announcement
- Available partner Portal Resources
 - Upcoming provider events
 - Provider training calendar
- Business Development Program Overview

An introduction to your Advisor team will follow your orientation meetings.



Caleb Temple

Business Operations Manager
Knoxville, TN

Agreement
Completed

E-mail &
Cards

Orientation

Sr. Advisor
Teaming

Role Review

Roadmap
Calls

Website

Prospecting

ELEMENTS OF SUCCESS | Senior Advisor Teaming

Your Role as a Senior Advisor

Advisors and eAgents are teamed with a Senior Advisor.

As a Senior Advisor, you will help guide your team members to success at Technology Source.

You will assist your team throughout the solution development process.

From the initial client meeting, Technology Source follows a strict process to thoroughly understand the clients needs.

From there, our team will work with our providers to identify a best-in-breed solution that meets the client's budget and implementation timeline.



Senior Advisor Team



John Perrine
Senior Advisor



Sean Mooney
Senior Advisor



Will Patterson
Senior Advisor



Jesus Arriaga
Senior Advisor



Jason Clements
Senior Advisor



Ron Reeves
Senior Advisor

Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

ELEMENTS OF SUCCESS | Senior Advisor

Senior Advisor

Our Senior Advisors are made up of seasoned, successful sales professionals.

The objective of our Senior Advisors is to coach and develop our Advisor team to accelerate revenue production and minimize turn-over.

Your role includes, but is not limited to the following responsibilities:

Prospecting Assistance

- Call / VM script development
- Objection handling
- Role playing
- Whisper-mode coaching

Appointments and Meetings

- Agenda creation
- Develop qualifying questions
- Assist with Identifying client requirements

Weekly Sales Meetings

- Review weekly, monthly and annual activity analytics
- Review funnel opportunities
- Provide coaching on best practices to close business

Salesforce Maintenance

- Updating Salesforce with client and opportunity information.
- Updating sales stages
- Attaching quotes and executed agreements



Account Renewals and Add-Orders

- Up-selling into your team's existing client base
- Reviewing contract expiration reports
- Working with our PDM to identify the account managers at the respective provider to renew contract terms

Tracking Sales Trending

- Monitor sales trending, average sale size, funnel contributions and overall funnel size.
- Communicate areas of concern and provide coaching as needed.

Creation of a Sales Plan

- Communication of monthly revenue production expectations.
- Creation of an activity plan that will result in the desired revenue output

Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

ELEMENTS OF SUCCESS | Role Review – Senior Advisor

Senior Advisor

At Technology Source, our compensation model provides our Senior Advisors with a salary, a portion of provider paid spiffs, an over-ride on Advisors sales and an attractive ramp bonus.

Once your monthly recurring billing base exceeds your salary, your annual salary will be increased to match your billing base.

Salary adjustments are made at the end of each quarter, when applicable, and there is never a cap on how much you can earn.

Spiffs

Technology Source pays our Sr. Advisors 50% of collected Spiffs from our service providers.

For spiffs collected from your support of an Advisor, Technology Source pays our Sr. Advisors 25% of the collected spiff.

Spiffs are paid the month following installation at month-end.

Commission Split

If you support a team of Advisors, you will receive 20% of the sales revenue towards your billing base.

Senior Advisors also receive 25% of the collected spiff from our service providers.

Ramp Bonus

During your first six months with Technology Source, we offer an attractive bonus program designed to incentivize a rapid sales ramp.



Ramp Bonus

Month*	Revenue Target	Bonus Earned
Month 1	\$1000	\$5000
Month 2	\$2000	\$5000
Month 3	\$3000	\$5000
Month 4	\$4000	\$5000
Month 5	\$5000	\$5000
Month 6	\$5000	\$5000

**If your start date is after the 1st of the month, your bonus program starts the following month.*



1

Roadmap Call – Friday

On-boarding call that provides a review of available resources from Technology Source.



2

Weekly Product Training

Expand your product knowledge with weekly trainings on products featured in our prospecting program.

3

Bi-Monthly Team Call

Discuss ideas that drive success.

Learn from the experiences of Senior Advisors and Advisors.

Track your sales metrics and plan your success.

Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

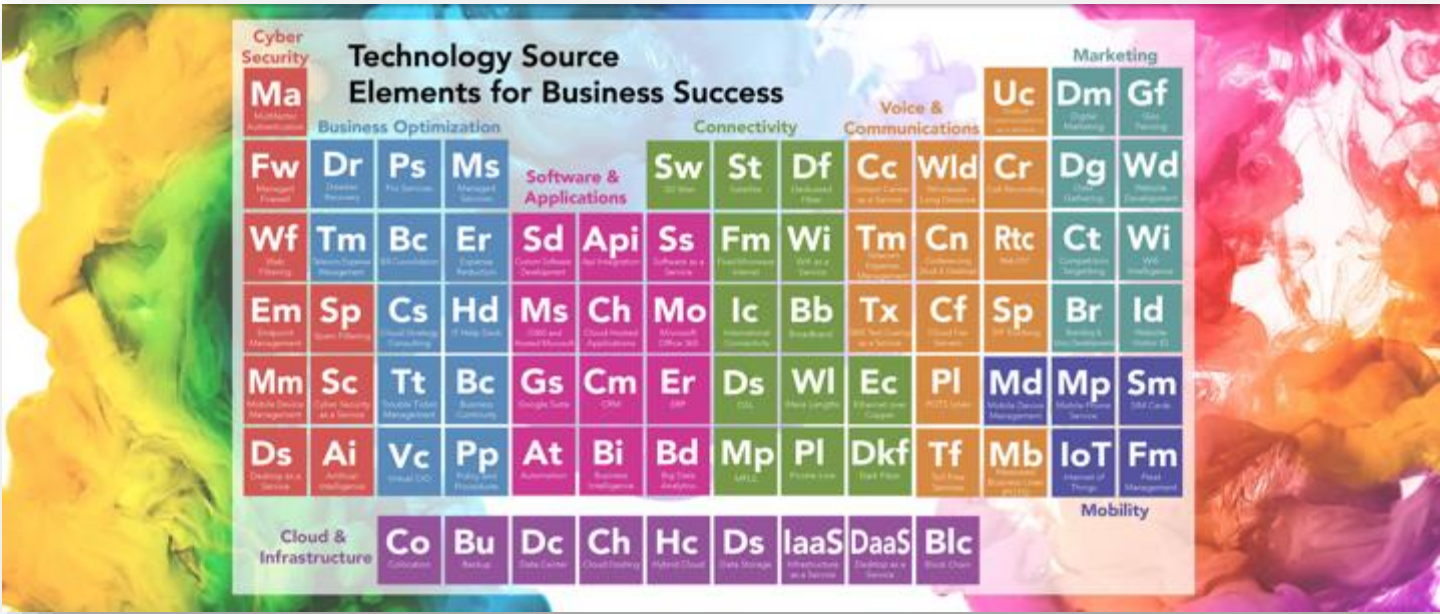
Role Review

Roadmap Calls

Website

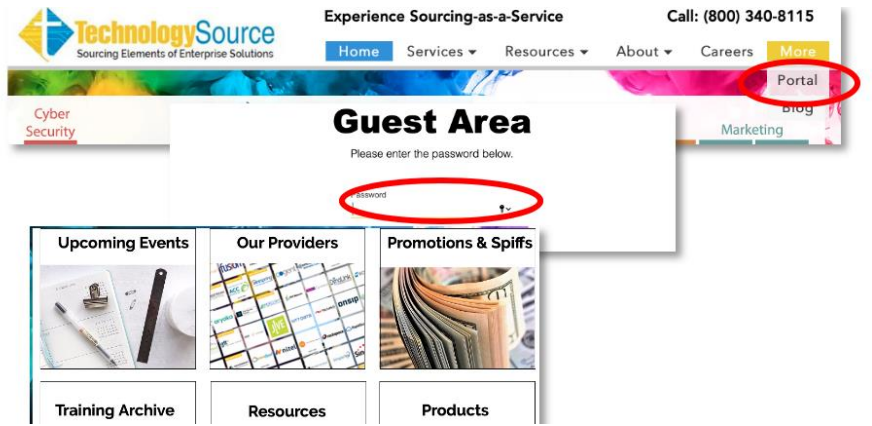
Prospecting

Product Options



Portal Access

1. Go to our website
2. Select "Portal"
3. Enter Password: moremoney



Gain access to upcoming events, provider and product information, training and more.



ELEMENTS OF SUCCESS | Client Prospecting

Relationships First

Senior Advisors should start by identifying 20-30 people that they know from prior employment or personal relationships.

This experience from calling people you know, will help you build the confidence needed to become more successful with your prospecting.

While we are a technology distributor that sells technology, you'll quickly find that what we really sell is credibility. The confidence of our Senior Advisor, when speaking with a prospect, helps to generate the credibility needed to converting a prospect into a client.

Business Development

Technology Source provides you access to our Business Development team. We utilize the latest prospecting software, which automates much of the administrative work required, so you can start generating revenue quickly.

Every two weeks, Technology Source launches a new campaign focused on technology solutions, that are in high demand.

Our campaigns incorporate emails, calls, text, videos, relevant business cases and webinars to introduce prospects to Technology Source providers and their solutions.



Agreement
Completed

E-mail &
Cards

Orientation

Sr. Advisor
Teaming

Role Review

Roadmap
Calls

Website

Prospecting

ELEMENTS OF SUCCESS | Client Prospecting

Prospecting Program Support

PRODUCT MARKETING CAMPAIGN

WEEKLY TRAINING MEETINGS

ROADMAP APPT SCRIPT

HOT LEAD NOTIFICATION

WEBINAR REGISTRATIONS TRACKED

END-USER WEBINAR

Service Provider Support

Technology Source's Service Providers are always available to meet with customers, assist with designs and present the final solution to your client.

Our Service providers are the subject matter experts and will work with you to assemble a team that will support your effort to win new business.



Additional resources

Be sure to join the **Advisor Best Practices call**.

Learn from Senior Advisors, and your peers, as they review successful case studies.

- Hear about Technology solutions .
- Learn from the Technology Source provider experts.

Agreement Completed

E-mail & Cards

Orientation

Sr. Advisor Teaming

Role Review

Roadmap Calls

Website

Prospecting

TECHNOLOGY SOURCE | Team contacts

Partner Development Manager

When to engage

- *Quoting assistance*
- *Escalation assistance during implementation or post – sale*
- *Contract renewals*
- *Add-orders*

Su Beler
Monterey
714-313-4514
su.b@technologysource.com

Business Operations Manager

When to engage

- *Help or questions regarding prospecting software tools*
- *On-Boarding new employees*

Caleb Temple
Knoxville, TN
865-660-1015
Caleb.t@technologysource.com

Chief Information Officer

When to engage

- *Escalation assistance*
- *Senior Advisor is not available for a client meeting*
- *When IT product expertise is needed*
- *As an additional resource during client prospect meetings*
- *C-Level meetings / Enterprise client meetings*

Sonya Meline
San Jose
619-379-1088
Sonya.m@technologysource.com

Chief Revenue Officer

When to engage

- *Escalation assistance*
- *VP / Senior Advisor is not available for a client meeting*
- *When Telecom product expertise is needed*
- *As an additional resource during client prospect meetings*
- *C-Level meetings / Enterprise client meetings*
- *Contract modifications / questions*

Robert Olson
Scottsdale, AZ
602-284-2007
Rob.o@technologysource.com

Additional Contact Information:

Order submission:

Orders@technologysource.com

Commission Issues:

Commissions@technologysource.com

ARIZONA
Scottsdale
By Appointment

CALIFORNIA
Orange County
[714-556-8006](tel:714-556-8006)
1551 N. Tustin Ave.
Suite #125
Santa Ana, CA 92705

GEORGIA
Atlanta
[\(470\)300-2550](tel:(470)300-2550)
600 Peachtree St. NE
Atlanta, GA 30308

TENNESSEE
Nashville
[615-905-0090](tel:615-905-0090)
3343 Aspen Grove Dr,
Suite 220
Franklin, TN 37067

LONDON, UK
CALL US
UK: [44-2036-087459](tel:44-2036-087459)

Sacramento
By Appointment

FLORIDA
Jacksonville
By Appointment

San Diego
[760-729-5305](tel:760-729-5305)
440 Stevens Ave,
Suite #200
Solana
Beach, CA 92075

TEXAS
Dallas
Coming Soon

NEVADA
Reno
By Appointment

San Jose
6203 San Ignacio Ave,
Suite 110,
San Jose, CA 95119